

(1) First and Final Report of Administrators on Waiver of Account and (2) Petition for Final Distribution and (3) for Order Fixing and Allowing Compensation to Attorneys for Ordinary and Extraordinary Services

1

(1) First and Final Accounting and Report of Conservator of Person and Estate, (2)
Petition for Allowance of Termination of Conservatorship and Discharge of
Conservator

DOD: 12-6-13		JAMES P. STAICER , Son and Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 8-20-13</u> <u>Minute Order 8-20-13:</u> Counsel is informed that an itemization will be needed for the attorney's fees. Counsel is directed to cure the remaining defects listed on the examiner notes. Continued to 9/3/13 at 9:00am in Dept. 303. <u>Note:</u> Itemization provided. See Page 2 re Supplement.
		Revised account period: 9-12-12 through 12-6-12 Accounting: \$18,834.07 / \$993.68 Beginning POH: \$18,834.07 Ending POH: \$0.00	
Cont. from 082013		Conservator: Not requested	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified	Attorney: \$4,500.00 (for 25 hours at a reduced rate of \$180/hr, per itemization)	
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC	Petitioner states conservatorship was necessary to enable Petitioner to access a 403(b) retirement account that was not transferred into the Conservatee's trust when it was created. American United Life Insurance Company was not satisfied that the Trust, the Advance Health Care Directive, or the Special Power of Attorney could be used to transfer the funds into the trust; therefore conservatorship was necessary. After issuance of letters, the transfer was allowed. The account was never utilized by the conservatorship estate or accessed by Petitioner because funds never became necessary before the Conservatee's death. Petitioner has provided trust account statements as a reference to clarify the status of the accounts.	
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg	Petitioner requests an order: 1. Approving, allowing, and settling the account; 2. Terminating the conservatorship; discharging the conservator and the surety on the bond; and 3. Authorizing payment of \$4,500.00 to the attorney for legal services to the conservatorship during the account period.	
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	2620(c)		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Reviewed by: skc

Reviewed on: 8-27-13

Updates: 8-29-13

Recommendation:

File 2 – Staicer

Page 2

1. The petition filed 7-15-13 had an account period of 6-29-12 through 7-13-13. Examiner Notes previously noted that the accounting was not in compliance with Probate Code §2620(b), which requires a separate accounting for the period after the conservatee's date of death, was not presented on the mandatory Judicial Council forms, and charges and credits did not balance. Further, it was unclear if there was property on hand, as a figure of \$17,840.39 was listed, but the petition indicated that there was nothing left in the conservatorship estate, as it did not request any distribution of that amount.

Supplement filed 8-28-13 puts the summary and schedules on the mandatory forms and revises the account to end at DOD (no subsequent period). The summary indicates POH is zero, but charges and credits still do not balance (\$18,834.07 / \$993.68). In the text, Petitioner explains that the asset – a retirement account – was distributed to the pay on death beneficiary; however, because Petitioner does not include the amount as a credit, and the account still technically does not balance.

Examiner's Note: It appears that if the figure previously provided as POH (\$17,840.39) is the same as the amount described as distributed, had been included in the credits summary, the account would balance, given the revised "receipts" figure; however, because that figure is not specifically referenced here, Examiner cannot assume that it is the same.

(1) First and Final Accounting and Report of Conservator of Person and Estate, (2)
Petition for Allowance of Termination of Conservatorship and Discharge of
Conservator

Age: 90		JAMES P. STAICER , Son and Conservator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		Account period: 6-29-12 through 7-1-13	<p>Minute Order 8-20-13: Counsel is informed that an itemization will be needed for the attorney's fees. Counsel is directed to cure the remaining defects listed on the examiner notes. Continued to 9/3/13 at 9:00am in Dept. 303.</p> <p>1. The Court may require clarification regarding the attorney's fee itemizations in this conservatorship and in the spouse's conservatorship (Page 2 of this calendar):</p> <p>It appears the same exact amount of time was spent on each spouse's petition and accountings, including 8 hours <u>each</u> in preparation of the petitions, after 7 hours <u>each</u> in review and consultation regarding the family circumstances.</p>	
Cont. from 082013		Accounting: \$66,675.39		
<input type="checkbox"/>	Aff.Sub.Wit.	Beginning POH: \$66,163.99		
<input checked="" type="checkbox"/>	Verified	Ending POH: \$ 0.00		
<input type="checkbox"/>	Inventory	Conservator: Not requested		
<input type="checkbox"/>	PTC	Attorney: \$4,500.00 (for 25 hours at a reduced rate of \$180/hr)		
<input type="checkbox"/>	Not.Cred.	<p>Petitioner states conservatorship was necessary to enable Petitioner to access an annuity that was not transferred into the Conservatee's trust when it was created. American United Life Insurance Company was not satisfied that the Trust, the Advance Health Care Directive, or the Special Power of Attorney could be used to transfer the funds into the trust; therefore conservatorship was necessary. After issuance of letters, the transfer was allowed. The account was never utilized by the conservatorship estate or accessed by Petitioner because funds never became necessary before the Conservatee's death. Petitioner has provided trust account statements as a reference to clarify the status of the accounts. Petitioner further states conservatorship is no longer necessary and has become detrimental to the Conservatee and his estate due to the associated costs.</p> <p>Petitioner requests an order:</p> <ol style="list-style-type: none"> 4. Approving, allowing, and settling the account; 5. Terminating the conservatorship; discharging the conservator and the surety on the bond; and 6. Authorizing payment of \$4,500.00 to the attorney for legal services to the conservatorship during the account period. 		
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			
<input type="checkbox"/>	Conf. Screen			
<input type="checkbox"/>	Letters			
<input type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input checked="" type="checkbox"/>	2620(c)			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: skc

Reviewed on: 8-27-13

Updates: 8-29-13

Recommendation:

File 3 – Staicer

(1) Waiver of Accounting and Petition for Final Distribution Under Will and for (2)
Allowance of Statutory Fees and Commissions

DOD: 9-19-12		BRETT ALAN TODD , Executor with Full IAEA without bond, is Petitioner. Accounting is waived I&A: \$565,611.97 POH: \$36,728.09 cash plus a one-half interest in certain real property, and various personal property items and a vehicle. Executor (Statutory): \$14,374.24 Attorney (Statutory): \$14,374.24 Closing: \$500.00 Distribution pursuant to Decedent's will: Shelby D. Williams: All vehicles and personal property items, including jewelry, watches, art, sports memorabilia listed in I&A. Brett Alan Todd, as Successor Trustee of the James P. Sheely Revocable Living Trust Agreement dated March 8, 2012: Decedent's one-half interest in certain real property located in Fresno and Kings Counties, plus cash in the amount of \$7,479.61	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 12-13-12		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: skc Reviewed on: 8-27-13 Updates: Recommendation: SUBMITTED File 4 – Sheely	

(1) Waiver of Accounting and Report of Administrator and Petition for Its Settlement; (2) Waiver of Administrator's Commissions; (3) for Allowance of Attorney's Fees for Ordinary Services, and (4) for Final Distribution [Prob. C. 10810, 10811, 10954 & 11640]

DOD: 11-14-12		BERNICE BALLESTEROZ , Spouse and Administrator with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$281,849.95 POH: \$287,451.44 (cash) Administrator (Statutory): Waived Attorney (Statutory): \$8,749.00 Distribution pursuant to intestate succession and Assignment of Interest filed 3-13-13: Bernice Ballesteroz: \$278,702.44	NEEDS/PROBLEMS/COMMENTS:
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
<input checked="" type="checkbox"/>	Letters 4-11-13		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
<input checked="" type="checkbox"/>	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 8-28-13	
		Updates:	
		Recommendation: SUBMITTED	
		File 5 – Ballesteroz	

Atty Wright, Janet L., of Wright & Johnson (for Petitioner Donald J. Granz, Jr.)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 5/23/2013		DONALD J. GRANZ, JR. , son and named Executor without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
Cont. from		Full IAEA – O.K.	
	Aff.Sub.Wit.	S/P	
✓	Verified		1. Need dates of death of DONALD J. GRANZ , predeceased spouse, and KEVIN DONNELLY , grandson, named in Decedent's Will and listed in Item 8 of the <i>Petition</i> , pursuant to Local Rule 7.1.1 (D).
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
✓	Aff.Pub.		Note: If <i>Petition</i> is granted, Court will set status hearings as follows:
	Sp.Ntc.		<ul style="list-style-type: none"> Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution.
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Will Dated: 10/22/2001

Residence: Fresno

Publication: Business Journal

Estimated value of the Estate:

Real property	-	\$200,000.00
Personal property	-	\$520,000.00
Annual income from P/P		\$ 12,000.00
Total	-	\$732,000.00

Probate Referee: Steven Diebert

Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.

Reviewed by: LEG

Reviewed on: 8/27/13

Updates:

Recommendation:

File 6 – Granz

Petition to Determine Succession to Real and Personal Property (Prob. C. 13151)

DOD: 04/04/2013		SALVADOR DIAZ , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Attachment 11 does not provide the decedent's interest in the real property. 2. The 2002 Nissan Truck listed on Attachment 11 was not included in the order.
		40 days since DOD	
		No other proceedings	
Cont. from			
	Aff.Sub.Wit.	I&A \$72,801.65	
✓	Verified	Decedent died intestate.	
	Inventory		
	PTC	Petitioner requests to assign his interest, or title to any and all property that has accrued as a result of being an heir to the estate of Carlos Diaz, to Maria Landeros, petitioner's daughter.	
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w/	
	Aff.Pub.	Decedent requests Court determination that decedent's interest in real property located at 1260 South Ave, Orange Cove, Ca., Wells Fargo Check Account #5358043379, 6478198622, Bank of America Checking Account #000077566640, Bank of America CD #70000077102723, uncashed checks in the amount of \$681.71 pass to Maria Landeros.	
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: LV Reviewed on: 08/27/2013 Updates: Recommendation: File 7 - Diaz

DOD: 05/17/2013		KORINA BERSENTES , daughter is petitioner and requests appointment as Administrator without bond. Petitioner is a resident of Superior, Colorado Full IAEA – o.k. Decedent died intestate. Residence: Fresno Publication: The Business Journal <u>Estimated value of the estate:</u> Personal property \$250,000.00 Probate Referee: Rick Smith	NEEDS/PROBLEMS/COMMENTS: 1. Proposed personal representative is a resident of Colorado. Probate Code §8571 states notwithstanding a waiver of bond, the Court in its discretion may require a nonresident personal representative to give a bond in an amount determined by the Court. 2. Petition states all heirs are adults and have waived bond. Need signed waivers of bond from: <ul style="list-style-type: none"> • Korina Bersentes • John Bersentes Or in the alternative bond set at \$250,000.00. Note: If <i>Petition</i> is granted, Court will set status hearings as follows: <ul style="list-style-type: none"> • Friday, February 7, 2014 at 9:00 a.m. in Dept. 303 for filing of final inventory and appraisal; and • Friday, November 7, 2014 at 9:00 a.m. in Dept. 303 for filing of first account and/or petition for final distribution. Pursuant Local Rule 7.5, if the documents noted above are filed 10 days prior to the dates listed, the hearings will be taken off calendar and no appearance will be required.
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/		
<input checked="" type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input checked="" type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting	Reviewed by: LV Reviewed on: 08/28/2013 Updates: Recommendation: File 8 – Bersentes	
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

Age: 95 DOB: unknown		<u>GENERAL HEARING 09/26/13</u>		NEEDS/PROBLEMS/COMMENTS:	
		RAYMOND LYSTER, grandson, is petitioner and requests appointment as temporary conservator of the person and estate with bond in the amount of \$15,000.00.		Court Investigator advised rights on 08/27/13.	
				1. Need <i>Notice of Hearing</i> .	
Cont. from				2. Need proof of personal service at least 5 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Temporary Petition</i> for: - Myrtle Lyster	
	Aff.Sub.Wit.			3. Need proof of service by mail at least 5 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Temporary Petition</i> for: - Larry Lyster (son)	
✓	Verified	<u>Estimated Value of the Estate:</u>		4. Need <i>Confidential Supplemental Information</i> .	
	Inventory	Personal property - \$105,000.00		5. Petitioner requests that bond be set at \$15,000.00; however, based on the estimated value of the estate, bond should be set at \$123,420.00, which includes the cost of recovery as required under Probate Code § 2320(c)(4).	
	PTC	Annual income - 7,200.00		6. Need CI report and advisement of rights – CI to provide.	
	Not.Cred.	Total - \$112,200.00			
	Notice of Hrg	x	Petitioner states that the proposed conservatee has alzheimer's and does not have the ability to manage her finances. She has an annuity that will disbursed to her on 09/03/13.		
	Aff.Mail	x	Temporary conservatorship is necessary in order to sign the documents to elect to have the annuity paid out in a lump sum.		
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.	x			
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp		Court Investigator Julie Negrete filed a report on 08/29/30.		
	Objections				
	Video Receipt				
	CI Report	x			
	9202				
✓	Order				
	Aff. Posting			Reviewed by: JF	
	Status Rpt			Reviewed on: 08/27/13	
	UCCJEA			Updates: 08/28/13	
	Citation			Recommendation:	
	FTB Notice			File 9 – Lyster	

10 Fred Otto Loeffler (CONS/PE)

Case No. 13CEPR00655

Atty Downing, Marcella

Atty Rube, Melvin K.

Atty Magness, Marcus D.

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
1820, 1821, 2680-2682)

Age:		NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 09/18/13</u> In Dept. 502 @ 9:00am Per minute order from hearing on 08/19/13
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
Reviewed by: JF		
Reviewed on: 08/27/13		
Updates:		
Recommendation:		
File 10 – Loeffler		

Atty Downing, Marcella

Atty Magness, Marcus D.

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C.
1820, 1821, 2680-2682)

Age:			NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED TO 09/18/13</u> In Dept. 502 @ 9:00am Per minute order from hearing on 08/19/13
DOD:			
Cont. from			
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF
			Reviewed on: 08/27/13
			Updates:
			Recommendation:
			File 11 – Loeffler

			NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>CONFIDENTIAL</u></p>
Cont. from 052013, 072313			
<input type="checkbox"/>	Aff.Sub.Wit.	<input type="checkbox"/>	
<input type="checkbox"/>	Verified	<input type="checkbox"/>	
<input type="checkbox"/>	Inventory	<input type="checkbox"/>	
<input type="checkbox"/>	PTC	<input type="checkbox"/>	
<input type="checkbox"/>	Not.Cred.	<input type="checkbox"/>	
<input type="checkbox"/>	Notice of Hrg	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Mail	<input type="checkbox"/>	
<input type="checkbox"/>	Aff.Pub.	<input type="checkbox"/>	
<input type="checkbox"/>	Sp.Ntc.	<input type="checkbox"/>	
<input type="checkbox"/>	Pers.Serv.	<input type="checkbox"/>	
<input type="checkbox"/>	Conf. Screen	<input type="checkbox"/>	
<input type="checkbox"/>	Letters	<input type="checkbox"/>	
<input type="checkbox"/>	Duties/Supp	<input type="checkbox"/>	
<input type="checkbox"/>	Objections	<input type="checkbox"/>	
<input type="checkbox"/>	Video Receipt	<input type="checkbox"/>	
<input type="checkbox"/>	CI Report	<input type="checkbox"/>	
<input type="checkbox"/>	9202	<input type="checkbox"/>	
<input type="checkbox"/>	Order	<input type="checkbox"/>	
<input type="checkbox"/>	Aff. Posting	<input type="checkbox"/>	
<input type="checkbox"/>	Status Rpt	<input type="checkbox"/>	
<input type="checkbox"/>	UCCJEA	<input type="checkbox"/>	
<input type="checkbox"/>	Citation	<input type="checkbox"/>	
<input type="checkbox"/>	FTB Notice	<input type="checkbox"/>	
			Reviewed by: skc
			Reviewed on: 8-27-13
			Updates:
			Recommendation:
			File 12 – Gomez

Age: 10		<u>NO TEMPORARY REQUESTED</u>		NEEDS/PROBLEMS/COMMENTS:	
		RUTH VELASQUEZ , paternal great-aunt, is Petitioner.		<p>1. Need proof of service by mail at least 15 days before the hearing of <i>Notice of Hearing</i> with a copy of the <i>Petition for Appointment of Guardian of the Person</i> <u>or</u> Consent & Waiver of Notice <u>or</u> Declaration of Due Diligence for:</p> <ul style="list-style-type: none"> - Dominic Alviar (brother) - Alexander Alviar (brother) 	
		Father: JOEY ALVIAR – Personally served on 07/20/13			
		Mother: JEANNIE ALVIAR – Consent & Waiver of Notice filed 06/24/13; Personally served on 07/03/13			
Cont. from		Paternal grandfather: AMADOR ALVIAR - deceased			
	Aff.Sub.Wit.		Paternal grandmother: ANNIE ALVIAR - deceased		
✓	Verified		Maternal grandfather: JONAS ALBERT - deceased		
	Inventory		Maternal grandmother: BERNICE ALBERT – deceased		
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
	Aff.Mail	x			
	Aff.Pub.				
	Sp.Ntc.				
✓	Pers.Serv.				
✓	Conf. Screen				
✓	Letters		Siblings: DOMINIC ALVIAR (18), ALEXANDER ALVIAR (13), BRIANNA ALVIAR (6)		
✓	Duties/Supp				
	Objections				
	Video Receipt		Petitioner states: due to a domestic dispute, the child's mother can no longer provide a stable home. The mother agrees that Petitioner should have guardianship because she is able to provide a safe and stable home.		
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt		Court Investigator Jo Ann Morris filed a report on 08/26/13.		
✓	UCCJEA				
	Citation				
	FTB Notice				
				Reviewed by: JF	
				Reviewed on: 08/27/13	
				Updates:	
				Recommendation:	
				File 13 - Alviar	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 1 year		<u>TEMPORARY EXPIRES 9/3/2013</u>		NEEDS/PROBLEMS/COMMENTS:	
		CHRISTINE MARTINEZ , paternal grandmother, is petitioner.			
		Father: JULIAN VALENCIA – consents and waives notice.			
Cont. from		Mother: JESSICA VALENCIA – consented and waived notice but now objects.			
	Aff.Sub.Wit.				
✓	Verified				
	Inventory				
	PTC				
	Not.Cred.				
✓	Notice of Hrg				
✓	Aff.Mail	W/			
	Aff.Pub.				
	Sp.Ntc.				
	Pers.Serv.				
✓	Conf. Screen				
✓	Letters				
✓	Duties/Supp				
	Objections				
	Video Receipt				
✓	CI Report				
	9202				
✓	Order				
	Aff. Posting				
	Status Rpt				
✓	UCCJEA				
	Citation				
	FTB Notice				
		<p>Paternal grandfather: Deceased. Maternal grandfather: Deceased. Maternal grandmother: Catherine Medina (Davis).</p> <p>Petitioner states neither parent is fit to raise the child. Father is incarcerated. Mother is on drugs.</p> <p>Objections of mother, Jessica Valencia, filed on 7/18/2013 states she was tricked into signing the court documents. She was under the impression that they were going to help her to keep her child from being removed from her custody. Mom states Christine's home has been targeted by the police as a known drug house with heavy trafficking. She is classified as an alcoholic, who drinks often and in heavy dosages. Mom states her mother, Catherine Davis, is in the process of moving into her home to help her care for the minor.</p> <p>Court Investigator Charlotte Bien's Report filed 8/27/2013.</p>			
				Reviewed by: KT	
				Reviewed on: 8/28/2013	
				Updates:	
				Recommendation:	
				File 14A – Valencia	

14B Katherine Lilian Valencia (GUARD/P)
Atty Martinez, Christine (pro per paternal grandmother)
Atty Davis, Catherine (pro per, Petitioner/maternal grandmother)

Case No. 13CEPR00579

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 1 year		<p align="center"><u>TEMPORARY (granted to paternal grandmother, Christine Martinez) EXPIRES 9/3/2013</u></p> <p>CATHERINE DAVIS, maternal grandmother, is petitioner.</p> <p>Father: JULIAN VALENCIA</p> <p>Mother: JESSICA VALENCIA – consents and waived notice</p> <p>Paternal grandfather: Deceased. Paternal grandmother: Christine Martinez Maternal grandfather: Deceased.</p> <p>Petitioner states the child is living in an unstable environment with a woman who is nervous and has anger issues and is known for consuming liquor. The minor is not safe, she is often neglected and left unattended in a play pen for long periods.</p> <p>Court Investigator Charlotte Bien's Report filed 8/27/2013.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need Notice of Hearing. 2. Need proof of personal service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Julian Valencia (father) 3. Need proof of service of the Notice of Hearing along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. Christine Martinez (paternal grandmother) 	
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<input type="checkbox"/>	Notice of Hrg			X
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			<p>Reviewed by: KT</p> <p>Reviewed on: 8/28/2013</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 14B – Valencia</p>	

14B

Petition to Determine Succession to Real Property (Prob. C. 13151)

DOD: 04/15/2013		MARGARITA PERRY , spouse, is petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petition was opened using a Fee Waiver. Filing fees are considered cost of administration and must be paid prior to distribution of property. Filing fee of \$435 is now due. 2. Per intestate succession the decedent's father, James Perry, is entitled to one half of the decedent's estate. Therefore he will need to join in as a petitioner and an amended petition will need to be filed.
		40 days since DOD	
		No other proceedings	
Cont. from		I&A \$80,000.00	
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	Not.Cred.	Petitioner requests Court determination that decedent's 100% interest in real property located at 1854 21 st , Kingsburg, Ca. pass to Margarita Perry pursuant to intestate succession.	
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			Reviewed by: LV
			Reviewed on: 08/28/2013
			Updates:
			Recommendation:
			File 15 – Perry

Pro Per Burt, Johnny (Pro Per Petitioner, maternal grandfather)
 Pro Per Athans, Kimberly (Pro Per Petitioner, step-grandmother)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Mikenzi Age: 7 yrs		<p align="center"><u>General Hearing set for 10/24/2013</u></p> <p>JOHNNY BURT and KIMBERLY ATHANS, maternal grandfather and step-grandmother, are Petitioners.</p> <p>Father of Mikenzi: DUANE BRANUM</p> <p>Father of Justin: JUSTIN LEVI SORRELLS; sent notice by mail 8/21/2013; personally served 8/25/2013.</p> <p>Mother: HAILEY BURT-SORRELLS; sent notice by mail 8/21/2013; personally served 8/25/2013.</p> <p>Paternal grandfather: Unknown Paternal grandmother: Unknown</p> <p>Maternal grandmother: Shelley Scott; sent notice by mail 8/21/2013.</p> <p>Petitioners state both parents have a long history of drug addiction, and the children have been in the Petitioners care for over a month now. Petitioners state the parents are not stable and cannot properly care for the children at this time, as they do not have adequate housing and are suffering from drug addiction. Petitioners state both children are subject to CPS but are currently with Petitioners in a safe and stable loving home environment, and require protection pending the general hearing.</p> <p>Petitioners request to be excused from giving notice to Mikenzi's father because his identity and whereabouts are unknown to Petitioners (no father is listed on the birth certificate.)</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. If Court does not excuse notice to the father of Mikenzi as Petitioners request, need Notice of Hearing and proof of five (5) court days' notice by personal service of the Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence for:</p> <ul style="list-style-type: none"> Duane Branum, father of Mikenzi (name obtained from Petitioners' Guardianship Questionnaire.) 	
Justin Age: 1 ½ yrs				
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<input type="checkbox"/>	FTB Notice			

Reviewed by: LEG
Reviewed on: 8/27/13
Updates:
Recommendation:
File 16 – Sorrells

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Kaydence 5 mos.		<p><u>TEMPORARY EXPIRES 09/03/2013</u></p> <p><u>GENERAL HEARING 10/24/2013</u></p> <p>VONDA MARIE RODGERS, maternal grandmother, is petitioner.</p> <p>Father of Jazmine: JOHNNY AVILA III, Deceased</p> <p>Father of Kaydence: NOT LISTED</p> <p>Mother: CRYSTAL RODGERS</p> <p>Paternal Grandparents of Jazmine: Not Listed</p> <p>Paternal Grandparents of Kaydence: Not Listed</p> <p>Maternal Grandfather: Joey Rodgers</p> <p>Petitioner states: the mother is doing drugs, is unstable and does not want the children. Petitioner is scared for her life and that of the children's as the mother has already pushed and hit the petitioner and has threatened to kill the petitioner if she takes the children.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for:</p> <ul style="list-style-type: none"> Father of Kaydence (Not Listed) <p>Note: Notice of Hearing filed 08/23/2013 states unknown father, no one to send to.</p>
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✓	UCCJEA		
	Citation		
	FTB Notice		

Reviewed by: LV
Reviewed on: 08/28/2013
Updates:
Recommendation:
File 17 – Palma & Avila